



**ENVIRONMENTAL PROTECTION AGENCY**

**EZ Tech  
Managed Print Services**

**SOURCE SELECTION DOCUMENTATION  
RFQ-OEI-13-0001**

**April 10, 2013**

## **I. PURPOSE**

The purpose of this document is to set forth the rationale for the selection of Cartridge Technologies Inc. (CTI) as the winning vendor for the Managed Print Services (MPS) acquisition. This recommendation is based on the Technical Evaluation Committee's (TEC) report on the technical quotes, price analysis performed within the Environmental Protection Agency (EPA) Office of Acquisition Management (OAM), and the Contracting Specialist's comparative assessment of quotes against all evaluation criteria.

## **II. LIST OF ATTACHMENTS**

- I. MPS Technical Evaluation Scoring Plan
- II. Price Quote Instructions
- III. Price Quote Adjustments
- IV. TEC Consensus Report

## **III. BACKGROUND**

In 2004, the Environmental Protection Agency (EPA) awarded a contract to Customer Technology Solutions (CTS), a single contract that provided printer support and services for EPA Offices. The Office on Environmental Information (OEI) has identified a need for continued printer support and services; however, chose not to exercise the option on the above contract.

### **A. Description of Requirement**

The support provided under this task order is required to provide printer support and services to all EPA users located at EPA's Headquarters in the Washington, D.C. metropolitan area and other locations throughout the country. The support includes all EPA printer devices. The Statement of Work (SOW) provides a more complete discussion of the scope of this requirement and is included under the "Statement of Work" tab to the official contract pre-award file.

### **B. Contract Types Considered**

After a review of the requirement, market research was conducted to determine if this requirement could be set aside to small business concerns. Once market research was received and evaluated, it was determined that the work to be performed under the SOW would best be acquired using GSA's Federal Supply Schedules Managed Print Services, Schedule 36, SIN 51-500 as a small business set aside procurement. As a result, the solicitation was sent to the following nine (9) small business GSA vendors:

<b>Vendor</b>	<b>GSA Contract #</b>
ABM Federal Sales, Inc.	GS-25F-0042L
ASE Direct, Inc.	GS-03F-0153X
Cannon IV, Inc.	GS-03F-0052X

Cartridge Technologies, Inc.	GS-03F-0151X
Iamner, Inc.	GS-03F-0067Y
JTF Business Systems, Inc.	GS-03F-0182V
Meridian Imaging Solutions, Inc.	GS-25F-0008T
Omni Business Systems-Fax Plus, Inc.	GS-25F-0051S
PrinTree, LLC.	GS-03F-0167X

### **C. Contract Type**

The Contracting Officer determined that a Fixed Price (FP) task order with both Fixed Price (FP) and Time-and-Material (T&M) Contract Line Item Numbers (CLINs) was the most appropriate in accordance with FAR 8.404(h) and FAR 16.104(e). The solicitation and any resultant contract will contain provisions and clauses for the issuance of FP and T&M CLINs. The period of performance is a one (1) year base period and three (3) one (1) year option periods.

### **D. Rationale for Not Using Performance-Based**

The resulting MPS task order will be performance-based as it pertains to payments, which are contingent upon meeting certain objective performance measures (i.e., Service Level Agreements (SLAs)). Due to the difficulties encountered throughout the life of the previous contract (i.e., the contractor stating that SLAs were met and the Government either rejecting them or unable to verify them), the Contracting Officer felt it was not in the best interest of the government to include all of the factors (i.e., defined incentives/penalties) normally associated with performance-based service contracting efforts in MPS.

### **E. Solicitation Procedures**

In accordance with FAR 8.405-2(c)(3), EPA issued the Request for Quote (RFQ) on November 20, 2012 via [www.ebuy.gov](http://www.ebuy.gov) to all nine (9) GSA Schedule 36, SIN 51-500 small business vendors. The RFQ included a description of the services to be performed as outlined in the SOW and the basis upon which a selection would be made as outlined in section 12.6 of the RFQ. EPA received four (4) quotes by the closing date of January 14, 2013. Vendors submitting quotes were:

ABM Federal Sales, Inc. (ABM)  
Cartridge Technologies, Inc. (CTI)  
Iamner, Inc. (IAM)  
PrinTree, LLC. (PT)

All quotes were evaluated in accordance with the evaluation criteria set forth in section 12.6 of the RFQ. The technical evaluation criteria, consisting of Pass/Fail Factors and Scored Technical Factors, were considered collectively to be significantly more important than price. The Pass/Fail criteria were evaluated on a "pass/fail" basis to determine the acceptability of the quote. The Pass/Fail Factors are outlined below.

	<b><i>PASS / FAIL EVALUATION CRITERIA</i></b>	<b><i>WEIGHT</i></b>
1	Preventative Maintenance Plan	Pass / Fail
2	Device Management Plan	Pass / Fail
3	Data Collection Plan	Pass / Fail
4	Phase-In Plan	Pass / Fail
5	Operational and Staffing Plan	Pass / Fail
6	Operational Level Agreements	Pass / Fail
7	Quality Assurance/Quality Control Plan	Pass / Fail
8	Conflict of Interest Plan	Pass / Fail

The Scored Technical Factors were assigned and evaluated using the following weights.

	<b>TECHNICAL EVALUATION CRITERIA</b>	<b>WEIGHT</b>
1	Small Business Status	50
2	Past Performance	25
3	Corporate Experience	15
4	Key Personnel	10
	Total Points	100

The solicitation notified vendors that EPA intended to award one (1) task order with a maximum potential contract period of performance of four (4) years, inclusive of option periods. Additionally, vendors were notified that the Government contemplated award of a Fixed Price (FP) task order with both Fixed Price (FP) and Time-and-Material (T&M) CLINs resulting from the solicitation.

#### **F. Evaluation Methodology**



The source selection was planned and conducted using trade-offs between price and non-price related factors being considered. Each quote was scored on a 0 to 5 point scale as set forth in Attachment I. The results of the evaluation are discussed in section IV herein.

#### **G. Decision to Award without Discussion.**

The Government intended to evaluate quotes and award the task order without discussions with vendors. After review of the TEC Consensus Report and assessment of each price quote submitted by the vendors, it was determined that it was in the best interest of the Government to allow vendors the opportunity to revise their quotes. After the technical evaluation factors were scored, and price quotes were evaluated, the contracting officer requested each vendor to correct deficiencies within their submitted quotes. This included questions raised by the TEC regarding their ability to make a determination of responsibility for the submitted plans and correcting deficiencies pertaining to their price quotes. All vendors were deemed potentially capable of receiving an award; therefore, all vendors were contacted to provide either revised plans or pricing data.

#### **IV. SUMMARY OF EVALUATION**

The Technical Evaluation Committee (TEC) initially convened on February 1, 2013 with (b)(5) in attendance to begin their consensus discussion of the technical quotes. The TEC, along with the (b)(5) re-convened on various dates to continue their discussion of the technical quotes until the final TEC Consensus meeting was held on February 14, 2013. Concurrent with the TEC effort, the Contract Specialist reviewed all price quotes for accuracy, completeness, and reasonableness. A summary of the results of the technical and price review are outlined below:

<b>SCORED EVALUATION FACTORS</b>	<b>MAX POINTS</b>	<b>VENDORS</b>			
		<b>ABM</b>	<b>CTI</b>	<b>IAM</b>	<b>PT</b>
Small Business Status	50	(b)(5)	(b)(5)	(b)(5)	(b)(5)
Past Performance	25				
Corporate Experience	15				
Key Personnel	10				
<b>TOTAL POINTS</b>	<b>100</b>		<b>92.5</b>		

<b>PASS / FAIL FACTORS</b>	<b>Pass / Fail</b>	<b>VENDORS</b>			
		<b>ABM</b>	<b>CTI</b>	<b>IAM</b>	<b>PT</b>

Preventative Maintenance Plan	Pass / Fail	Pass	Pass	Fail	Pass
Device Management Plan	Pass / Fail	Pass	Pass	Fail	Pass
Data Collection Plan	Pass / Fail	Pass	Pass	Fail	Pass
Phase-In Plan	Pass / Fail	Pass	Pass	Fail	Pass
Operational and Staffing Plan	Pass / Fail	Pass	Pass	Fail	Pass
Operational Level Agreements	Pass / Fail	Pass	Pass	Fail	Pass
QA / QC Plan	Pass / Fail	Pass	Pass	Fail	Pass
Conflict of Interest Plan	Pass / Fail	Pass	Pass	Fail	Pass

PRICE QUOTE		VENDORS			
		ABM	CTI	IAM *	PT *
Evaluated Price		(b)(4)	(b)(4)	(b)(4)	(b)(4)

\*Price adjusted

The price figures shown above have been adjusted as needed to correct any errors or omissions for each vendor. A detailed explanation of the price adjustments can be found below in section V and in Attachment III entitled "Price Quote Adjustments". The price analysis consisted of verifying that the hours used in each vendors' quote were accurate, the proposed labor mix and level-of-effort were reasonable (see section V herein), the information submitted in the price quote was consistent and the quotes complied with the requirements set forth in section 12 of the RFQ.

Attachment IV provides the TEC's Consensus Report delineating all the vendors' strengths and weaknesses. The technical evaluation consisted of evaluating all vendors' quotes against the evaluation criteria set forth in the solicitation and verifying that the quote complied with the requirements of section 12 of the RFQ.

## V. PRICE EVALUATION

### A. Price Adjustments.

The price figures shown in the table contained in section IV above have been adjusted as needed to correct any errors or omissions for each vendor. The specific adjustments made for each vendor's price quote are as follows:

**ABM:** (b)(5)

**CTI:** (b)(5)

**IAM:** (b)(4),(b)(5)

(b)(4),(b)(5)

**PT:** (b)(4),(b)(5)

(b)(4),(b)(5)

Pricing for all vendors is outlined below. The total price includes all options CLINS and all option periods.

PERIOD	MPS PRICING			
	ABM	CTI	IAM*	PT*
Base Period	(b)(5)	(b)(5)	(b)(5)	(b)(5)
Option Period I				
Option Period II				

Option Period III	(b)(5)	(b)(5)	(b)(5)	(b)(5)
<b>Total Contract</b>				
IGCE				
<b>Difference</b>				

\*Price adjusted

## B. Determination of Price Reasonableness.

The services offered on the vendors' GSA schedule contracts are priced at hourly rates. In accordance with FAR 8.404(d), GSA has already determined the rates for services offered at hourly rates under schedule contracts to be fair and reasonable. However, OAM performed a separate price evaluation, as required by FAR 8.405-2(d), to evaluate the proposed labor mix and level of effort for accuracy and reasonableness. As a result, OAM determined each vendor's price quote to be consistent with EPA's estimated labor mix and level of effort. The proposed labor rates by all vendors were consistent with their GSA Schedule rates. CTI's price was (b)(5) (b)(5) A determination of price reasonableness can be made based on the similarities in overall pricing, as compared to each other and the IGCE, submitted by all vendors and the evidence of adequate price competition.

## VI. SOURCE SELECTION RATIONALE

As stated previously, EPA plans to make one (1) award under this procurement. Based on a review of the technical and price quotes against the criteria set forth in the RFQ, the Contracting Specialist recommends CTI for the award. A comparison of the technical advantages CTI offers to the other vendors'—IAMNER, PrinTree, and ABM Federal—(b)(5) (b)(5)

### CTI

(b)(5)

*Past performance factor, available points 25*

CTI received a total (b)(5) of the available 25 points for the past performance evaluation criteria. (b)(5) (5)

(b)(5)

(b)(5)

(b)(5)

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## **IX. BEST VALUE DETERMINATION**

CTI had a lower price and a higher technical score than IAMNER, ABM or PrinTree.

(b)(5)

(b)(5)

### **A. Vendor Comparison**

(b)(5)

(b)(5)

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The price proposed by CTI is considered to be fair and reasonable as indicated in section V above and (b)(5) is the lowest price submitted by the vendors. The chart below outlines the cost and percentage difference of each vendor and the IGCE compared to CTI:

PRICE COMPARISION TO CTI				
CTI	ABM	IAMNER*	PRINTREE*	IGCE
(b)(4)				
% difference	(b)(4)			

\*Price adjusted

Additionally, the Contracting Specialist has determined CTI to be a responsible contractor (see section VIII herein).

Based on a thorough review of the technical and price quotes against the criteria set forth in the RFQ, it is recommended that award be made to CTI based on its quote that offers the highest quality, lowest risk, and lowest price, providing the most advantageous solution to the Government.

## VIII. RESPONSIBILITY DETERMINATION

Pursuant to FAR 9.104-1, the Contracting Officer made an affirmative determination of responsibility for the proposed contractor. CTL (b)(5)

(b)(5)

## X. APPROVALS / SIGNATURES

\_\_\_\_\_  
Martina Gillis-Massey  
*Contract Specialist*

\_\_\_\_\_  
Date

\_\_\_\_\_  
Bradley Austin  
*Contracting Officer*

\_\_\_\_\_  
Date

\_\_\_\_\_  
Lottie Plater  
*Reviewer*

\_\_\_\_\_  
Date

**ATTACHMENT I MPS Technical Evaluation Scoring Plan**

	<b>TECHNICAL EVALUATION CRITERIA</b>	<b>WEIGHT</b>
1	Small Business Status	50
2	Past Performance	25
3	Corporate Experience	15
4	Key Personnel	10
	Total Points	100

	<b><i>PASS / FAIL EVALUATION CRITERIA</i></b>	<b><i>WEIGHT</i></b>
1	Preventative Maintenance Plan	Pass / Fail
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3	Data Collection Plan	Pass / Fail
4	Phase-In Plan	Pass / Fail
5	Operational and Staffing Plan	Pass / Fail
6	Operational Level Agreements	Pass / Fail
7	Quality Assurance/Quality Control Plan	Pass / Fail
8	Conflict of Interest Plan	Pass / Fail



## **ATTACHMENT II Price Quote Instructions**

The Price Quote shall be written to include the following sections:

### **Cover Page**

This section shall include the Vendors' corporate name, address, phone, fax, DUNS, TIN, GSA Schedule contract number, point of contact (POC) name, POC title, POC phone, and POC email address.

### **Section 1 - Price Quote**

Contractors shall submit a written price quote by the date and time indicated in this TORFQ. Pricing shall be in accordance with the established parameters outlined in paragraph 4 entitled Contract Line Item Numbers (CLINs) above. All pricing and terms of this purchase order will be governed by the Vendors' GSA Schedule 36 SIN 51-500. The contractor's submission must identify its GSA Schedule Contract number and expiration date of the GSA contract.

Contractors shall provide a fixed price for Print per Page for EPA printers as outlined in paragraph 4 entitled Contract Line Item Numbers (CLINs) above. All contractors shall use the format outlined in Attachment X when submitting their price quote. Contractors should use Attachment III, which provides a list of EPA printers and their locations, as a guide in developing their price quote. The fixed price for Print per Page shall be the same regardless of the type of printer or location thereof. For T&M pricing, contractors should use Attachment IV in preparing their price quote for CLINS that involve labor categories and fixed loaded labor rates.

Contractors are encouraged to offer price discounts. When discounts are offered, quotes must identify both the GSA Schedule 36 SIN 51-500 contract number and the discounted rate for each print per page pricing and labor category being discounted. In addition, the price quote shall detail the following elements for each CLIN:

- All proposed items not on the Vendor's GSA Schedule contract (i.e., Open Market Items)
- All proposed Other Direct Costs (ODCs)
- Source of pricing for all costs, including the GSA contract number, SIN, and uniform resource locator (URL) to access the pricing information on-line
- The applicable GSA Schedule contract indirect rates (i.e., G&A and Materials)

### **Section 2 - Assumptions and Conditions**

This section shall describe any assumptions and conditions on which the Price Quote is based.

### **Section 3 – Sample Reports**

As part of the price quote, contractors shall provide a sample invoice representative of their proposed invoicing structure. At a minimum, the invoice format shall be one consolidated invoice for all locations with each location individually itemized and totaled. Additionally, a sample format for the required Monthly Fixed Price Financial Report is provided in section 9 and Attachment VI of this TORFQ. Contractors may propose an alternative format with their price quote to be evaluated for content and its ability to satisfy the requirements of section 9.

#### **Section 4 – Wage Determinations**

If a contractor proposes any labor categories subject to the Service Contract Act, the contractor shall identify those labor categories and provide the applicable wage determination number and a certification that the wages paid to these employees are at least the prevailing rates and fringe benefits as set forth on the following site, respective to the applicable geographical location: <http://www.wdol.gov/sca.aspx>. The wage determination certification shall be completed and submitted within this section of the price quote.

#### **Section 5 – General Financial and Organizational Information**

See Attachment VIII, General Financial and Organizational Information. This attachment shall be completed and submitted within this section of the price quote.

## **ATTACHMENT III Price Quote Adjustment**

## **ATTACHEMENT IV TEC Consensus Report**